Crystal Reporting Instructions
By Roger Taylor of Imperial County

1. SELECT TABLES FOR REPORT
   a. BILLING TX CHARGE DETAIL
   b. BILLING TX HISTORY
   c. BILLING TX MASTER
2. LINK TABLES
3. DROP IN FIELDS
   a. PATID
   b. EPISODE
   c. GUARANTOR
   d. GUARANTOR LIABILITY
   e. AGE ON DATE OF SERVICE
   f. DATE OF SERVICE
4. GROUP RECORDS BY PATID (CLIENT NUMBER) AND DATE OF SERVICE. (USE MONTH AS GROUP LEVEL FOR DATE OF SERVICE)
5. CREATE FORMULAS FOR EACH MONTH (OFTEN REFERRED TO AS MANUAL CROSS TAB)
6. PLACE FORMULA IN DETAIL LINE
7. CREATE A SUMMARY FOR EACH FORMULA (gf1a)
   a. SUMMARY TOTAL BY CLIENT
8. NOW ADD A GROUP LINE UNDER EXISTING GROUP 1
   a. INSERT SECTION UNDER CURRENT SECTION
9. IN THIS gf1b SECTION PUT A DISPLAY FORMULA FOR TOTAL CALCULATED ABOVE.
   a. IN THIS LINE PLACE THE LOGIC "IF GROUP TOTAL IS <= "YOUR LIMIT" THEN 0 ELSE GROUP TOTAL
10. NOW DO THIS FOR EACH MONTHLY TOTAL
11. ADD A TOTAL LINE ACROSS ALL SUMMARY TOTALS
12. IN SECITON EXPERT SUPPRESS IF SUMMARY TOTAL DOES NOT = "YOUR LIMIT" (FOR IMPERIAL THIS WAS 1088.
13. YOU SHOULD NOW ONLY SEE THOSE CLIENTS WHO FOR ANY GIVEN MONTH EXCEED YOUR THRESHOLD.
14. YOU CAN NOW EXPORT THESE GF1A LIBNES TO EXCEL USING EXPORT FEATURE.

   a.